



# Platforms and access to audiovisual contents: which challenges as regards to regulation?

# 1. What is a platform?

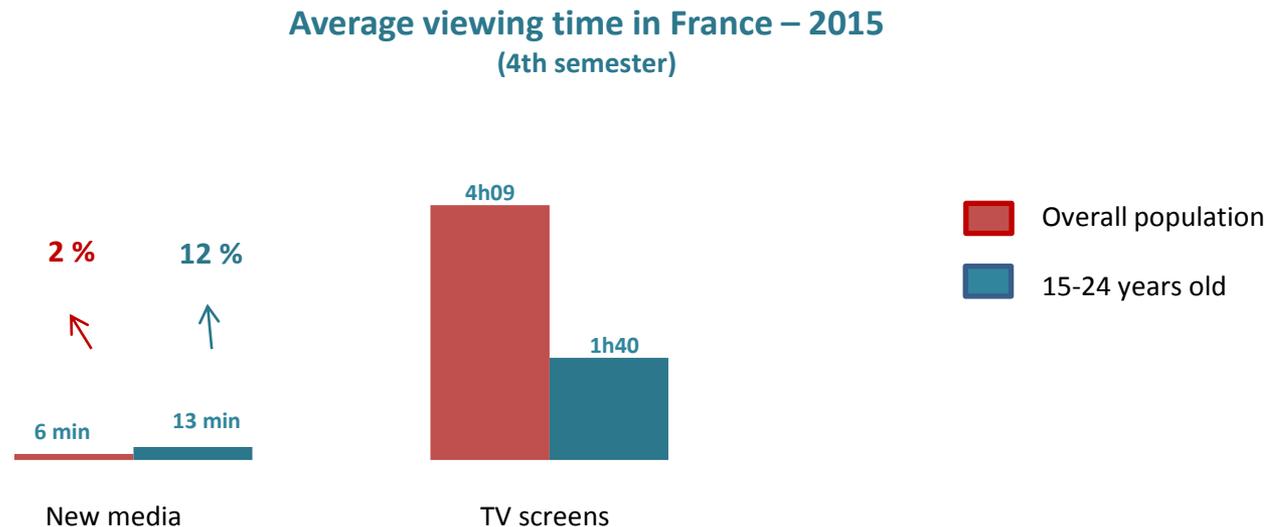
## → Definitions

- **Definitions already given by several public authorities in France (*Conseil d'Etat*, 2014; *Conseil national du numérique*, 2015; Bill « For a digital Republic », 2016)**
- **Platforms as defined by the study (p.8): “*[the] Platforms ensuring an intermediation between the AV content, the internet users, and other groups of users such as the advertisers*”.**
- **“*They blur the borders between different types of media, between the unprofessional and professional contents, and between free and paying.*”**

## 2. Which role is played by platforms as regards to audiovisual contents?

→ Use made by consumers

- **TV screens remain central despite a breakthrough in the use of « alternative screens »**



- **Tremendous surge in online video consumption**

- Online video consumption represented **70 %** of worldwide internet traffic in 2015 (Cisco)
- Platforms are central in this phenomenon

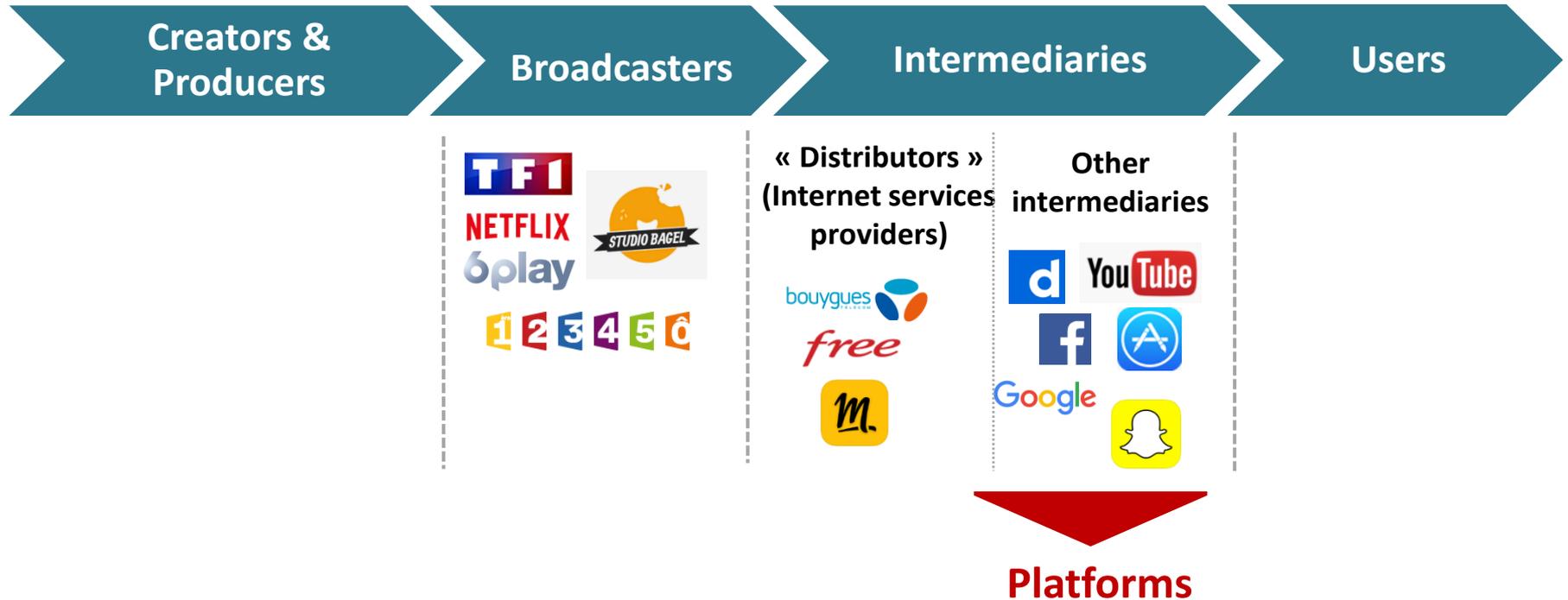
## 2. Which role is played by platforms as regards to audiovisual contents?

→ Use made by service providers

- **Linear TV broadcasters permanently use platforms** (Youtube, Facebook, Snapchat)
- AV contents are a **key element of their strategy** (e.g.: Apple and iTunes, Apple Music, Appstore)

### 3. How do platforms affect the value chain of AV media and monetize AV contents?

#### Value chain of AV contents



→ Purpose : to become more familiar with the role played by the platforms by analyzing their business models

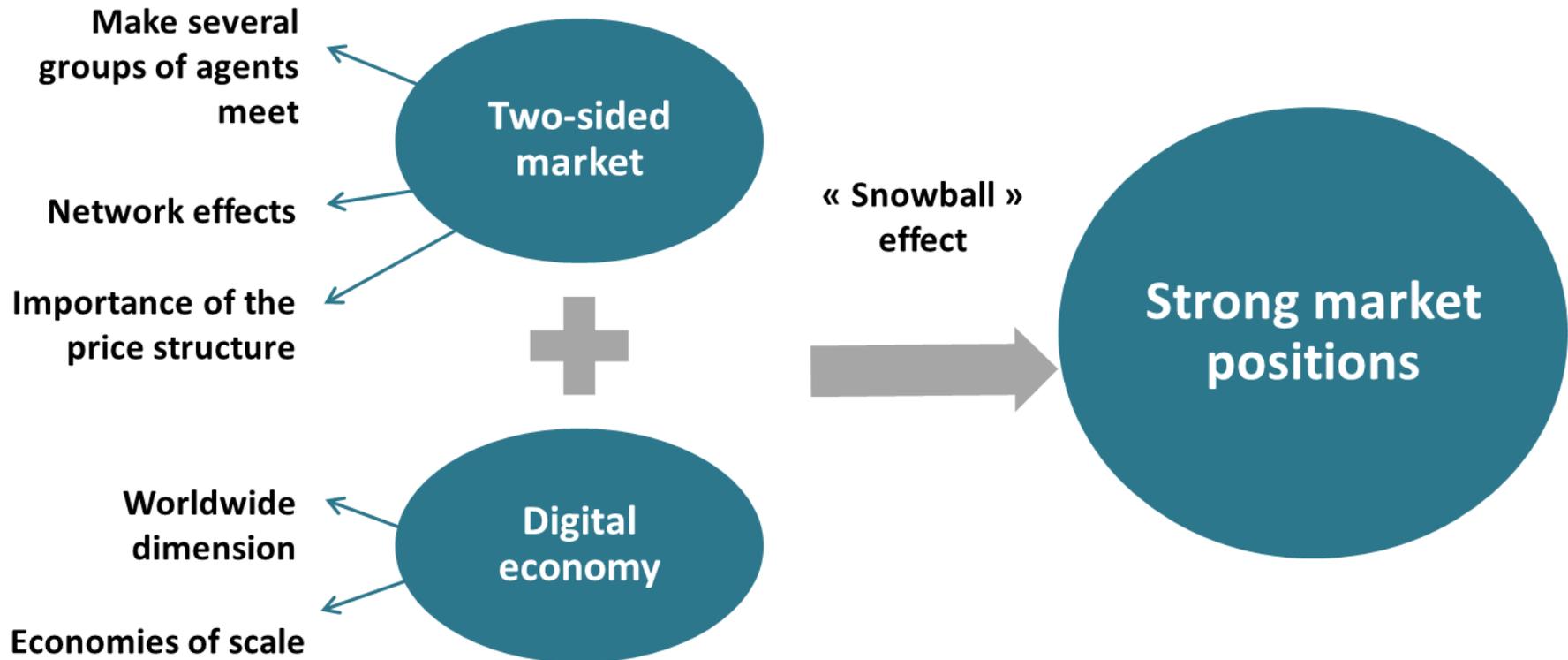
### 3. How do platforms affect the value chain of AV media and monetize AV contents?

→ Monetization of AV contents on platforms is based on two mechanisms:

- **Pay-for-content** model : still weak in France + proving fragile (Spotify : customers are reluctant to opt for the pay-for-content option)
- **Free** model : online advertising market is soaring

## 4. How is the platforms market shaping?

→ Economic characteristics of digital platforms (1/2)



## 4. How is the platforms market shaping?

→ Economic characteristics of digital platforms (2/2)

### Strengthened by barriers to entry

- Critical size
- Data
- Gratuity
- Exclusivities
- Impossible portability

**Strong market positions**

### Attenuated by some specificities of the digital market

- Short innovation cycles
- Consumer behavior: capacity to switch and multi-homing

**Video sharing platforms: in France YouTube still leader on the market**

 **22,6 M** UV / month  
**1,8 Billion** videos watched/ month

 **5,1 M** UV / month  
**59 M** videos watched /month

*Médiamétrie*

# 5. What are the upcoming challenges as regards to regulation?

1. Networks and platforms **neutrality**
2. Content **referencing** conditions
3. Prescription power of the platforms: striking a balance between **diversity** and personalization
4. **Standardization** of content offers: a hurdle to innovation?
5. Content **moderation**: striking a balance between consumers protection and freedom of expression
6. Compliance with **copyright** and **IP law**
7. Innovations in **advertising**: how to conciliate issues and expectations of all agents?
8. Mastering and using the **data**
9. **Sharing the value** between platforms and traditional actors
10. Funding the contents: How to adapt the AV **content funding ecosystem**?

→ Thank you for your attention !

→ To download the document: <http://www.csa.fr/Etudes-et-publications/Les-etudes-thematiques-et-les-etudes-d-impact/Les-etudes-du-CSA/Plateformes-et-acces-aux-contenus-audiovisuels>

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